

20-8

Admin: Staff Relink

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Overview

The Staff Relink function has been developed to resolve the recurring problem of redundant staff records in the database. When two or more staff records represent the same user, the data redundancy cascades through a large number of HiCAMS and Vendor records and eventually causes confusion wherever an Inspector needs to be chosen (Samples, Pay Records, Densities, etc.) Since the redundant staff record problem is ever increasing, it was necessary to create a facility to streamline the data clean up process. This allows the appropriately authorized HiCAMS users to independently clean up the duplicated staff records using the Staff Relink module in HiCAMS.

The three functions provided by Staff Relink are Deleting, Retaining, and Merging. A Staff record that is marked Delete is completely removed from the data base. This can only occur for those Staff Records which do not have any other records in HiCAMS linked to them. Retain and Merge are used together to join multiple records that exist for the same staff person. The Retained Staff record is that one which remains in the database. It retains all its own records and inherits the records that are part of the Merged Staff. The Merged Staff record is the one which is removed from the database, and whose records are assumed by the Retained Staff.

Delete Staff Records

Staff members who are no longer active and have no HiCAMS or Vendor history records associated to their Staff Ident can be deleted. The request for Deletion is made through Staff Relink but the deletion's success or failure is not identified until the weekly Staff Relink process is run. If the Deletion is unsuccessful, the user who requested the Deletion is notified.

Step 1: Select **Admin® Staff Relink**. The **Staff List** window displays.

Step 2: Enter the Last Name of the user to be deleted and click **Retrieve**. Multiple rows may be returned. Select the record of the user to be deleted and drag it down to the lower portion of the window:

Staff List

Last Name: MARTIN Office Category: (All) Retrieve

Job Title: (All) Office Location: (All)

Status: (All)

Name	Office Location	Job Title	Security Organization	User ID	Nick Name
Martin, Adam	Generic Producer or Supplier	Producer Technician	Non-DOT Tech (I - M)	54695notasgn	
Martin, Arnold	Generic Producer or Supplier	General DOH Techniciar	General DOH Tech (I - M)	9938notasgn	
Martin, Arrie D	Generic Producer or Supplier	Producer Technician	Non-DOT Tech (I - M)	54569notasgn	
Martin, Bobby D	Generic Producer or Supplier	Producer Technician	Non-DOT Tech (I - M)	54844notasgn	
Martin, Dan	Division 13 Office	Division Engineer	Division 13	pmartin	
Martin, Dana S	Generic Producer or Supplier	Producer Technician	Non-DOT Tech (I - M)	54669notasgn	
Martin, Dean T	Generic Producer or Supplier	Producer Technician	Non-DOT Tech (I - M)	53235notasgn	
Martin, Edward H	Generic Producer or Supplier	General DOH Techniciar	General DOH Tech (I - M)	7714notasgn	
Martin, Garry L	Generic Producer or Supplier	Producer Technician	Non-DOT Tech (I - M)	50706notasgn	
Martin, Greg	Generic Producer or Supplier	Producer Technician	Non-DOT Tech (I - M)	50849notasgn	
Martin, Jacqueline	Resident Engineer - Manteo	Consultant Inspector	Division 1	jmartin	
Martin, Jimmy	Generic Producer or Supplier	Producer Technician	Non-DOT Tech (I - M)	51706notasgn	
Martin, John	Generic Producer or Supplier	Producer Technician	Non-DOT Tech (I - M)	51719notasgn	
Martin, John H	Generic Producer or Supplier	Producer Technician	Non-DOT Tech (I - M)	51717notasgn	

Drag and Drop Desired Staff:

53235 Martin, Dean T

OK Cancel

Step 3: Click **OK**. The **Staff Relink** window displays the record selected in the top section of the window:

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Staff Relink

Staff ID	Display Name	User ID	Office Location	Technician ID	Certification Name	Relink:
53235	Dean T. Martin	53235notasgr	Generic Producer or Sup	53235	ABC ACI CDT PCT	

Buttons: Retain, Delete, Unselect, Add

Retain Staff

Staff ID: Last User ID:
 SSN: Last Update Date:
 User ID: Expiration Date:
 First Name: Middle Name:
 Last Name: Nickname:
 Display Name: Technician ID:
 Job Title:
 Office Location:

Certification Name	Status	Cert Date	Expire Date	Retain
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Buttons: Edit Staff Details, Unretain Staff

Delete Staff

Staff ID: Last User ID:
 SSN: Last Update Date:
 User ID: Expiration Date:
 First Name: Middle Name:
 Last Name: Nickname:
 Display Name: Technician ID:
 Job Title:
 Office Location:

Certification Name	Status	Cert Date	Expire Date	Retain
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Buttons: Undelete Staff

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Step 4: Click **Delete**. The **Delete Staff** section of the window is populated with the staff information:

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Staff Relink

Staff ID	Display Name	User ID	Office Location	Technician ID	Certification Name	Relink:
53235	Dean T. Martin	53235notasgr	Generic Producer or Sup	53235	ABC ACI CDT PCT	Delete

Buttons: Retain, Delete, Unselect, Add

Retain Staff

Staff ID: Last User ID:
 SSN: Last Update Date:
 User ID: Expiration Date:
 First Name: Middle Name:
 Last Name: Nickname:
 Display Name: Technician ID:
 Job Title:
 Office Location:

Certification Name	Status	Cert Date	Expire Date	Retain
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Buttons: Edit Staff Details, Unretain Staff

Delete Staff

Staff ID: 53235 Last User ID: ahdaniel
 SSN: 000000000 Last Update Date: 11/2/2001
 User ID: 53235notasgr Expiration Date: 12/31/2075
 First Name: Dean Middle Name: T
 Last Name: Martin Nickname:
 Display Name: Dean T. Martin Technician ID: 53235
 Job Title: Producer Technician
 Office Location: Generic Producer or Supplier

Certification Name	Status	Cert Date	Expire Date	Retain
ABC Sampling School	Active	3/3/2000	12/31/2003	<input type="checkbox"/>
ACI Field Testing Technician - Grade	Active	10/18/2001	12/31/2005	<input type="checkbox"/>
Conventional Density Technician	Active	3/4/2003	12/31/2006	<input type="checkbox"/>
Concrete Field Technician (Testing)	Active	10/18/2001	12/31/2005	<input type="checkbox"/>

Buttons: Undelete Staff

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Step 5: To continue the staff deletion, click the **Save** icon on the toolbar.

Note: *To remove Staff from the relink set, click the **Undelete Staff** button and then **Unselect** to remove the Staff member from the list. Finish by clicking the Save icon on the toolbar and closing the window.*

Step 6: If finished with the current relink set, click the “X” button to close the window.

To confirm the Relink set is Pending to be processed, generate a **Staff Relink Report**. See Generate a Staff Relink Report for instructions.

Merge/Retain Staff Records

If multiple records exist for the same Staff person, they can be combined using the Merge staff portion of Staff Relink. The Retained Staff record will be the one which remains in the database. It will retain all its own records and will inherit the records that belong to the Merged Staff record(s). The Merged Staff record(s) are the ones which are removed from the database, and whose records are assumed by the Retained Staff.

Step 1: Select **Admin® Staff Relink**. The **Staff List** window displays.

Step 2: Enter the Last Name of the user whose records need to be merged and click Retrieve. Select the multiple Staff records to be Merged/Retained and drag them to the bottom section of the window. Click **OK**.

Note: *SHIFT-select to pick adjacent records and CTRL-Select to pick non-adjacent records.*

Step 3: The **Staff Relink** window displays, with the selected Staff rows displayed in the top portion of the window:

Staff List

Last Name: PHILLIPS Office Category: (All) Retrieve

Job Title: (All) Office Location: (All)

Status: (All)

Name	Office Location	Job Title	Security Organization	User ID	Nick Name
Phillips, Max R	Division 13 Office	Division Construction En	Division 13	mphillips	
Phillips, Michael Gary	Resident Engineer - Sanford	Assistant Resident Engi	Division 8	mgphillips	
Phillips, Michael L	Resident Engineer - Sanford	Construction Technician	Division 8	8313notasgn	
Phillips, Murry	Consultant	Consultant Inspector	Non-DOT Tech (N - R)	50335notasgn	
Phillips, Murry T	Resident Engineer - Fayettev	Lead Project Inspector	Division 6	474notasgn	
Phillips, Murry T	Resident Engineer - Fayettev	Contract Inspector	Division 6	mntphillips	
Phillips, R.	Generic Producer or Supplier	General DOH Technician	General DOH Tech (N - R)	6125notasgn	
Phillips, Raymond	Generic Producer or Supplier	Producer Technician	Non-DOT Tech (N - R)	52930notasgn	
Phillips, Riley T	Resident Engineer - Sanford	Construction Technician	Division 8	679notasgn	
Phillips, Robert V	Resident Engineer - Sanford	Construction Technician	Division 8	rphillips	
Phillips, Terrilyn D	Harrington Street	Production Support Sper	HiCAMS Team	1772notasgn	
Phillips, Thomas K	Generic Producer or Supplier	Producer Technician	Non-DOT Tech (N - R)	54114notasgn	
Phillips, Thomas Kyle	Generic Producer or Supplier	General DOH Technician	General DOH Tech (N - R)	3738notasgn	
Phillips, Thurston	Generic Producer or Supplier	Producer Technician	Non-DOT Tech (N - R)	52931notasgn	

Drag and Drop Desired Staff:

474 Phillips, Murry T
50065 Phillips, Murry T

OK Cancel

Note: In this scenario, the user has duplicate records in HiCAMS, and the staff record with the active HiCAMS logon id will be retained. This staff record also contains the most active certifications.

Step 4: Review the Staff displayed in the top section of the window. If a Staff record has been selected in error, highlight that row and click the **Unselect** button to remove that record from the relink set. Click the **Add** button to display the **Staff List** window once again and search for the correct Staff record.

Step 5: Select the Staff record to be Retained by highlighting the row and clicking the **Retain** button. The **Retain Staff** section of the window is populated and the Certification information attached to that Staff record is displayed:

Staff ID	Display Name	User ID	Office Location	Technician ID	Certification Name	Relink
50065	Murry T. Phillips	mtphillips	Resident Engineer - Fay	50065	ABC ACI PCT RD1 Rwy	Retain
474	Murry T. Phillips	474notasgn	Resident Engineer - Fay 474		ABC PCT	

Retain Staff
Staff ID: 50065 Last User ID: CONV5.6
SSN: 000000000 Last Update Date: 6/12/2003
User ID: mtphillips Expiration Date: 12/31/2075
First Name: Murry Middle Name: T
Last Name: Phillips Nickname:
Display Name: Murry T. Phillips Technician ID: 50065
Job Title: Contract Inspector
Office Location: Resident Engineer - Fayetteville, Ramsey St.

Certification Name	Status	Cert Date	Expire Date	Retain
Sampling School	Active	2/10/2003	12/31/2005	<input checked="" type="checkbox"/>
Testing Technician - Grad	Active	5/8/2001	12/31/2005	<input checked="" type="checkbox"/>
Field Technician (Testing)	Active	5/8/2001	12/31/2005	<input checked="" type="checkbox"/>

Merge Staff
Staff ID: Last User ID:
SSN: Last Update Date:
User ID: Expiration Date:
First Name: Middle Name:
Last Name: Nickname:
Display Name: Technician ID:
Job Title:
Office Location:

Edit Staff Details Unretain Staff Unmerge Staff

Step 6: Review the Certifications listed in the **Retain Staff** section. If necessary, remove the check mark from the **Retain** column for the inappropriate certification(s). This Deletes the Certification from the Staff Record. By default, all Certifications are retained. The most recent Certification in each category will be displayed on the Technician Certification Tab in DOH Vendor. Any repeat Certifications with older dates will be displayed on the Technician History Tab.

Note: *If necessary, you may remove the currently selected Staff record from the Retain status by clicking the **Unretain Staff** button.*

Step 7: Select the Staff record to be Merged by highlighting the row and clicking the **Merge** button. The **Merge Staff** section of the window is populated and the Certification information attached to that Staff record is displayed:

Staff ID	Display Name	User ID	Office Location	Technician ID	Certification Name	Relink
50065	Murry T. Phillips	mtphillips	Resident Engineer - Fayetteville	50065	ABC ACI PCT RD1 RWY	Retain
474	Murry T. Phillips	474notasgn	Resident Engineer - Fayetteville	474	ABC PCT	Merge

Retain Staff

Staff ID: 50065 Last User ID: CONV5.6
SSN: 000000000 Last Update Date: 6/12/2003
User ID: mtphillips Expiration Date: 12/31/2075
First Name: Murry Middle Name: T
Last Name: Phillips Nickname:
Display Name: Murry T. Phillips Technician ID: 50065
Job Title: Contract Inspector
Office Location: Resident Engineer - Fayetteville, Ramsey St.

Certification Name	Status	Cert Date	Expire Date	Retain
ABC Sampling School	Active	2/10/2003	12/31/2006	<input checked="" type="checkbox"/>
ACI Field Testing Technician - Grade	Active	5/8/2001	12/31/2005	<input checked="" type="checkbox"/>
Concrete Field Technician (Testing)	Active	5/8/2001	12/31/2005	<input checked="" type="checkbox"/>
GMS Roadway Technician	Active	8/16/2001	12/31/2004	<input checked="" type="checkbox"/>

Edit Staff Details Unretain Staff

Merge Staff

Staff ID: 474 Last User ID: CONV5.6
SSN: 000000000 Last Update Date: 6/12/2003
User ID: 474notasgn Expiration Date: 11/8/1999
First Name: Murry Middle Name: T
Last Name: Phillips Nickname:
Display Name: Murry T. Phillips Technician ID: 474
Job Title: Lead Project Inspector
Office Location: Resident Engineer - Fayetteville, Ramsey St.

Certification Name	Status	Cert Date	Expire Date	Retain
ABC Sampling School	Expired	1/13/1997	12/31/1999	<input checked="" type="checkbox"/>
Concrete Field Technician (Testing)	Expired		6/30/2001	<input checked="" type="checkbox"/>

Unmerge Staff

Note: If necessary, you may remove the currently selected staff record from the Merge status by clicking the **Unmerge Staff** button.

Step 8: Review the Certifications listed in the **Merge Staff** section. If necessary, remove the check mark from the **Retain** column to Delete the inappropriate Certification(s).

Step 9: Click the Save icon on the toolbar. To Merge additional Staff records on the existing list, repeat Steps 7 and 8. A Save must be performed after each Merge. To incorporate other Staff records into this Relink set, click the Add button. The Staff List is again displayed, and additional Staff members can be selected, and then Merged.

Step 10: Close the window to complete the Relink process.

To confirm the Relink set is Pending to be processed, generate a **Staff Relink Report**.

Generate a Staff Relink Report

Step 1: Select the **Staff Relink Report** name from the **Select A Report** window. This report is only available to people who have access to the Staff Relink Function.

Step 2: Click **Generate**. The **Staff Relink Report** Preview window displays:

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Staff Relink Report

North Carolina Department of Transportation

Staff Relink Report

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06/17/2003

Staff	Merge Staff	Tech ID	Relink	Set By	Certification Description	Certified	Expiration	Status	Retain Cert	
Murry T. Phillips	474	Murry T. Phillips	474	Retain	Randy K. Pace	Concrete Field Technician (Testing)	00/00/0000	06/30/2001	Expired	Delete
						ABC Sampling School	01/13/1997	12/31/1999	Expired	Delete
	8024	Dwight Daniel Phillips	8024	Pending	Randy K. Pace	Concrete Field Technician (Testing)	00/00/0000	06/30/2002	Expired	Pending
	50065	Murry T. Phillips	50065	Merge	Randy K. Pace	Concrete Field Technician (Testing)	05/08/2001	12/31/2005	Active	Retain
						ACI Field Testing Technician - Grade I	05/08/2001	12/31/2005	Active	Retain
						QMS Roadway Technician	08/16/2001	12/31/2004	Active	Retain
						ABC Sampling School	02/10/2003	12/31/2006	Active	Retain
						QMS Roadway Final Review Technician	08/16/2001	12/31/2004	Active	Retain

Zoom:

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Step 3: Review the report contents for accuracy. For example, the above report displays the following requested changes pending:

- Tech ID #474 and corresponding Certifications have been retained. However, the Certifications attached to the (*retained*) Staff Record for Tech ID #474 are *Expired* (see **Status** column) and also been marked for deletion (see **Retain Cert** column).
- Tech ID #50065 has been removed from the system and the corresponding Certifications have been attached to Tech ID #474. (A Notification will be sent after the weekly job runs to request these Certifications be re-printed with Tech ID #474).
- Tech ID #8024 has a Relink Status of “Pending”; this indicates that the Record was selected for Relink, but no action was taken. Therefore, after the weekly job runs, this staff record will remain unchanged (no action will be taken).

The Report can be printed for your records. The **Staff Relink Report** information will record Staff Relink sets completed each week, and will be purged following the completion of the weekly task, which is run automatically by HiCAMS each Sunday evening.

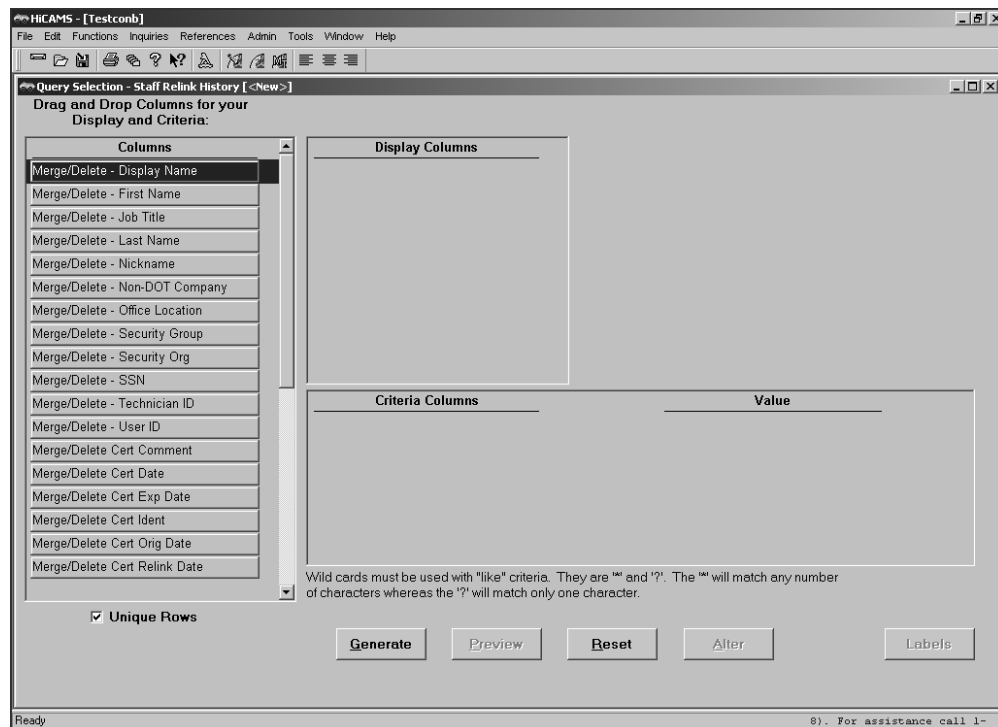
Historical information on completed Relink sets is done by generating Staff Relink queries.

Generate Staff Relink Queries

Information contained on the **Staff Relink Report** is purged weekly following the completion of the automated weekly task. However, a query can be generated to review all previously completed Relink Sets:

Step 1: From the **Inquiries** menu, select **Query Tools ® Staff Relink History**.

Step 2: The **Query Selection – Staff Relink History** window displays:



Step 3: Select the appropriate Columns to display using Criteria as required to generate the desired results. The following is an example of a query designed to provide information (including Merged/Deleted Certs) on Merged, Deleted or Retained Staff for user rpace for the previous week:

Query Selection - Staff Relink History [<New>]

Drag and Drop Columns for your Display and Criteria:

Columns

- Merge/Delete Cert Ident
- Merge/Delete Cert Orig Date
- Merge/Delete Cert Relink Date
- Merge/Delete Cert Status
- Merge/Delete Certification
- Merge/Delete Staff ID
- Relink OK
- Relink Status
- Requested By
- Requested On
- Retain - Display Name
- Retain - First Name
- Retain - Last Name
- Retain - Nickname
- Retain - SSN
- Retain - Technician ID
- Retain - User ID
- Retain Staff ID

Display Columns

- Merge/Delete - Display Name
- Merge/Delete - Non-DOT Company
- Merge/Delete Cert Date
- Merge/Delete Cert Exp Date
- Merge/Delete Certification
- Merge/Delete Cert Status
- Merge/Delete Cert Relink Date
- Relink OK
- Retain - Technician ID

Criteria Columns

Criteria Columns	Value
Requested By	= rpace
Requested On	> 06/16/2003
Requested On	< 06/20/2003

Wild cards must be used with "like" criteria. They are "*" and "?". The "*" will match any number of characters whereas the "?" will match only one character.

☒ Unique Rows
Total tables in query is 5
Maximum tables allowed is 16

Snapshot Report (2 Rows)
(Size columns and press Preview)

Merge/Delete Cert Relink	Merge/Delete - Display Name	Merge/Delete - Technician ID	Retain - Technician ID
06/18/2003	Murry T. Phillips	474	50065
06/18/2003	Murry T. Phillips	474	50065

Buttons: Generate, Preview, Reset, Alter, Labels

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The Criteria Columns indicate that only Relink Sets performed on June 17th, 18th, and 19th by user rpace will be displayed.

Step 4: Click **Generate**. The **Snapshot Report** window will display the query results:

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Query Selection - Staff Relink History [<New>]

Snapshot Report (2 Rows)
(Size columns and press Preview)

Merge/Delete Cert Relink	Merge/Delete - Display Name	Merge/Delete - Technician ID	Retain - Technician ID	Merge/Delete Cert Date	Merge/Delete Cert Exp Date	Relink OK	Merge/Delete - Non-DOT Company	Merge/Delete Certification
06/18/2003	Murry T. Phillips	474	50065	01/13/1997	12/31/1999	Y	C. W. BROWN	ABC Sampling Sch
06/18/2003	Murry T. Phillips	474	50065		06/30/2001	Y	C. W. BROWN	Concrete Field Technician (Testing)

Unique Rows

Total tables in query is 5
Maximum tables allowed is 16

Generate Preview Reset Alter Labels

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Step 5: Move columns and resize as necessary to fit columns on printed report.

Step 6: Click **Preview**. The **Print Preview** window displays:

HICAMS - [Testconb]

File Edit Functions Inquiries References Admin Tools Window Help

Print Preview (Query)

North Carolina Department of Transportation
Staff Relink History

Merge/Delete Cert Relink	Merge/Delete - Display Name	Merge/Delete - Technician ID	Retain - Technician ID	Merge/Delete Cert Date	Merge/Delete Cert Exp Date	Relink OK	Merge/Delete - Non-DOT Company	Merge/Delete Certification	Merge/Delt Cert
06/18/2003	Murry T. Phillips	474	50065	01/13/1997	12/31/1999	Y	C. W. BROWN	ABC Sampling School	Expired
06/18/2003	Murry T. Phillips	474	50065		06/30/2001	Y	C. W. BROWN	Concrete Field Technician (Testing)	Expired

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Step 7: Click the **Print** icon on the toolbar to print the Query Report. Compare results against previously printed Staff Relink Standard Reports.